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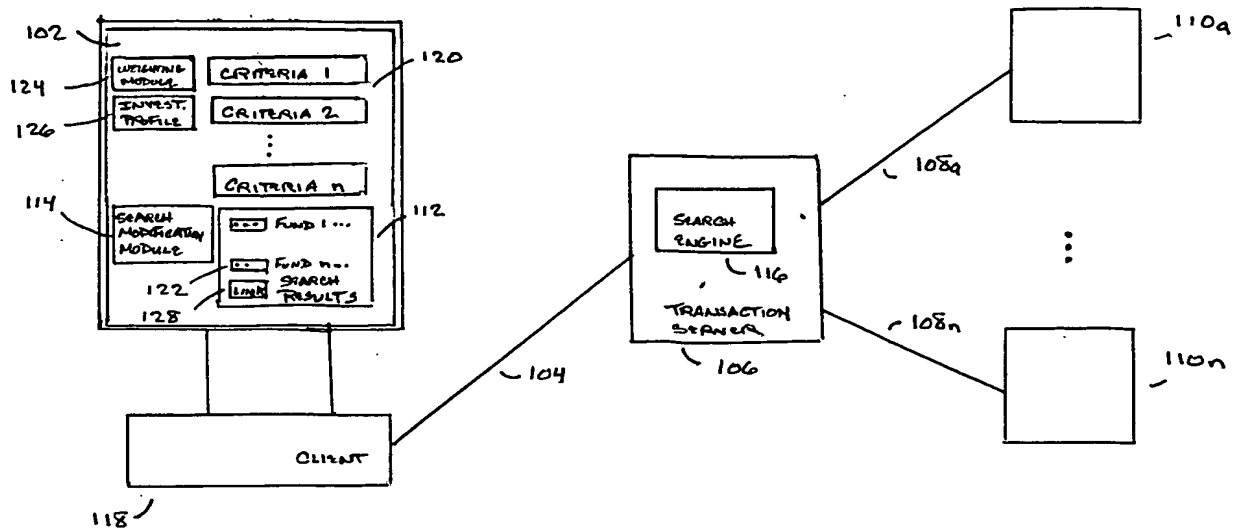



FIG. 1



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	WingspanBank APR	National Average	Investment Information Provided by Wingspan Investment Services**	
Home Equity Loan	8.74% ***	8.95%	Symbol	Symbol Lookup
Personal Loans	12.99%	14.30%	<input type="text"/>	<input type="button" value="Get Quote"/>

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## Brokerage



New FundProfiler! Use our high-tech tool to match funds to specific investment priorities.  
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Trade for as little as \$19.95! Check out our low fees.

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Enter Symbol:

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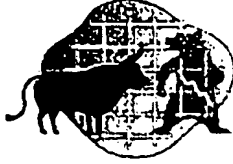
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**Wingspan Investment Services' FundProfiler**



FundProfiler—our high-tech mutual fund search tool—sifts through more than seven thousand funds to compile a list that match specific investment priorities.

Use FundProfiler to find funds that match specific investment priorities by:

- Selecting a profile that best describes the fund you are seeking.
- Setting criteria for 11 mutual fund features.
- Sorting through the results.

**Log In Before You Begin**

Access all of FundProfiler's features: log in before you begin. If you don't have an account with us, apply now.

To take full advantage of FundProfiler, carefully read our detailed instructions before you proceed.

Go To FundProfiler

Detailed Instructions

If you have any questions regarding FundProfiler please contact our customer care advisors at 1-888-420-7440 Monday through Friday, 8:30 a.m. to 10 p.m. Eastern time.

FundProfiler does not make recommendations for mutual fund purchases. It does not rank funds by quality, nor rate any fund better than any other fund. It does provide you with important information on the funds within its database. Always read a prospectus carefully before investing. The prospectus contains additional information including fees, charges, and expenses.

FundProfiler does not constitute an offer of sale for any of the funds displayed. Such offer can only be made by the fund's own prospectus.

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Fig. 2(c)

102

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## Wingspan FundProfiler Detailed Instructions

### Detailed Instructions

FundProfiler, a sophisticated search tool, sifts through more than seven thousand mutual funds to compile a list of mutual funds that match specific investment priorities. FundProfiler takes you through three main screens: start, criteria, and results.

### Start

On the "Start" screen, FundProfiler provides five predefined profiles and a custom option. Choose the profile that most closely describes the type of fund you are seeking. Choose the custom option if none of the predefined profiles adequately describes the type of fund you are seeking.

**Note:** Exposure to market fluctuations is associated with investor risk. Funds with high exposure to market fluctuations tend to present investors with more risk; funds with low exposure to market present investors with less risk.

### Criteria

The Criteria screen lists 11 mutual fund features. For more information about a feature, select the corresponding "Learn More" button.

You can set criteria for each feature. If, on the Start screen, you select:

- A predefined profile, the criteria for each feature will be preset.
- The custom option, no criteria will be set.

You can customize your profile by editing a predefined profile. Use the "Edit" buttons next to each feature to select the criteria that best describe the type of mutual fund you are shopping for. For example, use the "Edit" button next to investment objective to choose an investment objective from a drop-down list that includes growth, growth and income, income, etc.

Use the radio buttons to the right of each feature to indicate how important the feature is to your overall investment objective. The radio buttons:

- Range from most important (left) to least important (right).
- Tell the FundProfiler which features you are most concerned with and which concern you less.

For example, if a fund's ten-year performance is more important to you than a fund's annual portfolio turnover, position the ten-year performance indicator further to the left than the annual portfolio turnover indicator.

You can ensure that all of the funds in your results have the criteria you've indicated for a specific feature by selecting the corresponding "must have" radio button. Each must have feature generally reduces the number of funds in your final results. However, if you do not indicate that a feature must have the criteria that you've selected, your resulting funds may not exactly match your criteria.

### Results

The Results screen lists funds that meet, or closely match, the criteria you set forth on the Criteria screen. You can sort your resulting funds according to a variety of options. Initially, FundProfiler sorts your results by match score.

FIG. 2(c)

The match score:

- Indicates how closely the fund meets the criteria you selected on the previous screen, taking into account the relative importance you assigned to each criterion.
- Is not a rating of the fund's quality. Funds with high match scores are not better than funds with low match scores; rather, funds with high match scores more closely match the criteria you selected, weighted by the relative importance you assigned to each, than funds with low match scores.

You can access important information about a fund—including a breakdown of the fund's features compared to the criteria you selected—by clicking on the fund's ticker symbol.

**Please keep these important notes in mind as you use FundProfiler**

- **Asset Allocation.** Asset allocation is an important factor in a portfolio's total long-term performance. While FundProfiler does not address asset allocation, it can help you select mutual funds from each asset class. If you are allocating your portfolio across different asset classes or investment styles, as many investors do, use FundProfiler again and again to review funds in each of your allocation categories.
- **Funds.** FundProfiler does not make fund recommendations, nor does it rank the funds displayed. FundProfiler is an information tool only. A fund's past performance does not indicate future results.
- **Prospectuses.** You can order free prospectuses through FundProfiler by selecting the fund's "Prospectus" button. Read the fund's prospectus carefully before you invest. If you do not have a Wingspan Investment Services (WIS) account, you will need to provide delivery information.
- **Purchases.** Not all funds are available for sale through WIS; not all funds are available for sale to residents of every state. If you have a WIS account, you can purchase mutual funds through FundProfiler by selecting the "Buy" button. Applicable WIS transaction costs, if any, will be disclosed at the point of purchase. If you do not have a WIS account, you cannot purchase mutual funds through FundProfiler, but you can apply for a WIS account by selecting the "Apply" button.
- **Taxes.** Some mutual funds provide tax benefits such as tax-exempt status. Wingspan Investment Services' FundProfiler does not include tax exempt funds.


If you have any questions regarding FundProfiler, please contact our customer service representatives at 1-888-420-7440 Monday through Friday, 8:30 a.m. to 10 p.m. Eastern time.

FundProfiler does not make recommendations for mutual fund purchases. It does not rank by quality, nor rate any fund better than any other fund. It does provide you with important information on the funds within its database. Always read a prospectus carefully before investing. The prospectus contains additional information including fees, charges, and expenses. FundProfiler does not constitute an offer of sale for any of the funds displayed. Such offer can only be made by the fund's own prospectus.

**Go To FundProfiler**

102

Fig. 2(e)



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## FundProfiler

[1 Start](#) | [2 Criteria](#) | [3 Results](#)

---

### Step One: Select a Profile

NEXT

Select the profile from the table below that best describes the type of fund you are seeking.

- ☐ Custom- I prefer to set my own preferences. I do not want any default values set for me.
- ☐ Very Conservative- I want to search for funds that seek current income and seek to minimize exposure to market fluctuations.
- ☐ Conservative- I want to search for funds that seek current income. I am willing to accept moderate exposure to market fluctuations in exchange for potentially higher returns.
- ☐ Moderate- I want to search for funds that seek higher income and/or a blend of growth and income. I am willing to accept varying degrees of exposure to market fluctuations in exchange for potentially higher returns.
- ☐ Moderate Aggressive- I want to search for funds that seek high total return. I am willing to accept high exposure to market fluctuations in exchange for potentially higher returns.
- ☐ Very Aggressive- I want to search for funds that seek high capital growth, very high total returns, and/or limited diversification. I am willing to accept very high exposure to market fluctuations in exchange for potentially higher returns.

NEXT

**Quick Search** Enter a fund family name to narrow your search:


GO

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Fig. 2 (f)



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## FundProfiler

1 Start: Criteria 3 Results

### Step Two: Choose Your Criteria

PREVIOUS

NEXT

We will compile a list of mutual funds that match, or closely match, the criteria you specify for each feature below. The initial settings are based on the profile you selected; tailor your results by changing the settings to match the funds you are seeking.

You can use the "Edit" buttons to choose a range for each feature. Use the radio buttons to select the importance of each feature to you. The "Must Have" radio buttons will ensure that results meet your specific criteria.

Features	Criteria								
Performance: 1 Year <a href="#">learn more</a>	<input type="button" value="EDIT"/> No Preference	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Performance: 5 Years <a href="#">learn more</a>	<input type="button" value="EDIT"/> No Preference	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Performance: 10 Years <a href="#">learn more</a>	<input type="button" value="EDIT"/> No Preference	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Performance: Year to Date <a href="#">learn more</a>	<input type="button" value="EDIT"/> No Preference	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Performance: Since Inception <a href="#">learn more</a>	<input type="button" value="EDIT"/> No Preference	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Total Expense Ratio <a href="#">learn more</a>	<input type="button" value="EDIT"/> No Preference	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Operations <a href="#">learn more</a>	<input type="button" value="EDIT"/> No Preference	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Annual Portfolio Turnover <a href="#">learn more</a>	<input type="button" value="EDIT"/> No Preference	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Portfolio Manager Tenure <a href="#">learn more</a>	<input type="button" value="EDIT"/> No Preference	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Risk <a href="#">learn more</a>	<input type="button" value="EDIT"/> No Preference	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Investment Objective <a href="#">learn more</a>	<input type="button" value="EDIT"/> No Preference	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

PREVIOUS

NEXT

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FIG. 2(g)

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## FundProfiler

### Learn More

**Performance: 1 Year**


Usually expressed as a percentage, one-year performance is a measure of the return on an investment over the past 12 months. Performance is usually compared to other funds with similar investment strategies. While a fund's past performance does not indicate its future returns, it does provide a metric to compare funds with similar objectives under similar economic conditions.


BACK

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102

FIG. 2(h)

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## FundProfiler

### Edit: Criteria

Use the drop-down boxes below to select the ranges for the feature selected.

**Feature: Performance: 1 Year**


from (min)  to (max)


< [Previous Feature](#)   [Next Feature](#) >

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102

FIG. 2 (i)

### ① Start ② Criteria ③ Results

**STIMULUS**

We have compiled the list of funds below based on the criteria you selected. To view more information about the table's symbols and buttons, check out the [Key](#).

Funds Searched: 5553  
Fund Families Searched: 494

Sort by: **Match Score** 

**To view details for up to three funds, side-by-side, check their boxes and select the "Display" button.**

Symbol	Fund Name	Match Score	1 Year Return	5 Year Return	10 Year Return	Since Inception	Inception Date	
<input checked="" type="checkbox"/> <u>INTX</u>	1838 Investment Advisors Funds: 1838 International Equity Fund	100	33.20%	n/a	n/a	13.70%	08/03/1995	APPLY PROSPECTUS
<input checked="" type="checkbox"/> <u>ACGFX</u>	AARP Growth Trust: AARP Capital Growth Fund	100	35.00%	25.20%	15.50%	17.10%	12/04/1984	APPLY PROSPECTUS
<input checked="" type="checkbox"/> <u>AAISX</u>	AARP Growth Trust: AARP International Growth & Income Fund	100	21.10%	n/a	n/a	13.20%	02/03/1997	APPLY PROSPECTUS
<input type="checkbox"/> <u>AUSSX</u>	AARP Growth Trust: AARP U.S. Stock Index Fund	100	23.40%	n/a	n/a	24.10%	02/03/1997	APPLY PROSPECTUS
<input type="checkbox"/> <u>RIEQX</u>	ABN AMRO Funds: International Equity Fund; Common Class Shares	100	31.30%	13.60%	n/a	14.50%	01/04/1993	APPLY PROSPECTUS
<input type="checkbox"/> <u>RLAEX</u>	ABN AMRO Funds: Latin America Equity Fund; Common Class Shares	100	24.60%	n/a	n/a	4.60%	06/28/1996	APPLY PROSPECTUS
<input type="checkbox"/> <u>AIINX</u>	Accessor Funds, Inc.: International Equity Portfolio;	100	37.10%	n/a	n/a	13.40%	07/06/1998	APPLY PROSPECTUS

112

FIG. 2 (j)

Wingspan FundProfiler

Investor Class  
Shares

<input type="checkbox"/> AGROX	Accessor Funds, Inc.: Growth Portfolio; Advisor Class Shares	100	29.90%	29.10%	n/a	23.80%	08/24/1992	<input type="button" value="Apply"/>
<input type="checkbox"/> AGRIX	Accessor Funds, Inc.: Growth Portfolio; Investor Class Shares	100	29.30%	n/a	n/a	22.50%	07/01/1998	<input type="button" value="Apply"/>
<input type="checkbox"/> ACIEY	Accessor Funds, Inc.: International Equity Portfolio; Advisor Class Shares	100	37.80%	13.90%	n/a	13.40%	10/03/1994	<input type="button" value="Apply"/>

To view details for up to three funds, side-by-side, check their boxes and select the "Display" button. Go to page:  of 556

Quick Search Enter a fund family name to narrow your search:   Results per page:

Key

To view details for up to three funds, side-by-side, check their boxes and select the "Display" button.

Symbol

To view fund details, click on the fund's ticker symbol.

Match Score

A measure of how closely a fund matches your selected criteria. Match scores, which range from zero to 100, do not represent an investment recommendation or ranking by investment performance. For an analysis of the score, click on the colored bars (■ ■ ■).

A blue bar indicates that a fund matches all of your preferences.

A yellow bar indicates that a fund is missing one or more of your preferences.

Returns

The fund's performance over the past one year, five years, ten years, or since inception. Past performance is not indicative of future returns.

Inception Date

The date the fund was opened to investors.

If you want to purchase a fund but you do not have a Wingspan Investment Services account, select the "Apply" button and complete our online application.

Before investing or sending money, read the prospectus carefully. If you want to obtain:

FIG. 2 (K)

# Quick Search

- A free prospectus, which contains more information including fees, sales charges, and expenses, select the "Prospectus" button.
- More than one prospectus, note the ticker symbol; you will not be able to return to these results after making your initial prospectus request.

Quick Search

To view funds from just one family, use Quick Search.



To choose a new profile, select the "Start Over" button.

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Disclosure



Disclosure

Fig. 2. (2)

Thank you for your interest in WingspanBank.com. Please fill in the following information and the mutual fund prospectus will be mailed to you. You may also request up to four additional prospectuses on this form if you know the ticker symbol.

M.I.

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42	43	44	45	46	47	48	49	50	51	52	53	54	55	56	57	58	59	60	61	62	63	64	65	66	67	68	69	70	71	72	73	74	75	76	77	78	79	80	81	82	83	84	85	86	87	88	89	90	91	92	93	94	95	96	97	98	99	100	101	102	103	104	105	106	107	108	109	110	111	112	113	114	115	116	117	118	119	120	121	122	123	124	125	126	127	128	129	130	131	132	133	134	135	136	137	138	139	140	141	142	143	144	145	146	147	148	149	150	151	152	153	154	155	156	157	158	159	160	161	162	163	164	165	166	167	168	169	170	171	172	173	174	175	176	177	178	179	180	181	182	183	184	185	186	187	188	189	190	191	192	193	194	195	196	197	198	199	200	201	202	203	204	205	206	207	208	209	210	211	212	213	214	215	216	217	218	219	220	221	222	223	224	225	226	227	228	229	230	231	232	233	234	235	236	237	238	239	240	241	242	243	244	245	246	247	248	249	250	251	252	253	254	255	256	257	258	259	260	261	262	263	264	265	266	267	268	269	270	271	272	273	274	275	276	277	278	279	280	281	282	283	284	285	286	287	288	289	290	291	292	293	294	295	296	297	298	299	300	301	302	303	304	305	306	307	308	309	310	311	312	313	314	315	316	317	318	319	320	321	322	323	324	325	326	327	328	329	330	331	332	333	334	335	336	337	338	339	340	341	342	343	344	345	346	347	348	349	350	351	352	353	354	355	356	357	358	359	360	361	362	363	364	365	366	367	368	369	370	371	372	373	374	375	376	377	378	379	380	381	382	383	384	385	386	387	388	389	390	391	392	393	394	395	396	397	398	399	400	401	402	403	404	405	406	407	408	409	410	411	412	413	414	415	416	417	418	419	420	421	422	423	424	425	426	427	428	429	430	431	432	433	434	435	436	437	438	439	440	441	442	443	444	445	446	447	448	449	450	451	452	453	454	455	456	457	458	459	460	461	462	463	464	465	466
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[illegible]

State\*

Code\*

1	2	3	4	5

INTEK ☐ ☐ ☐ ☐

Submit Reset

FIG. 2 (m)

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## FundProfiler

Start Criteria **Results**

### Match Score Analysis

The colored icons reflect how well a feature matches your preferences. The more blue the icon is, the better it matches your preferences. For more information about symbols and buttons, check out the Key.


### Analysis of the Match Score

Fund: 1838 Investment Advisors Funds: 1838 Internatio...

Match Score:  100

#### Hits

1 important preferences are met. Your most important features are displayed below.

Feature	Your Preference:	This Fund:
 Performance: 1 Year- <small>learn more</small>	5.00% - 20.00%	33.20%

#### Additional Information

There was no data for 2 of your important preferences.








You did not express a preference, or chose "Not Important" for 10 features.

To see how each feature measured up to the criteria you selected, click the Details button.

[BACK](#)

[DETAILS](#)

#### Key:

-    These icons reflect how well a feature matches your preferences. The more blue the icon is, the better it matches your preferences
-  The blue icon containing an exclamation point indicates that although this fund does not meet your preference, it may deem it more beneficial than the preference you selected (e.g., a higher return than you specified), so please review it carefully.
-  The yellow icon containing a red "x" indicates that your preference was not met
-  The open grey circle indicates that no preference, or "Not Important" was selected
-  The grey hash mark or "n/a" indicates that data was not available, not applicable, or could not be verified

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Fig. 2 (n)



12/22/2009 10:23:50 AM

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Member NASD/SIPC

Trading Demo Portfolio Demo Research Marketwatch Quotes & News Customer Services

FundProfiler

Start Criteria Results

Results - Display

Details for the funds you selected appear side-by-side below. The colored icons ( ) next to each feature indicate how well each feature matches the criteria you specified. The more blue an icon is, the better it matches your preferences. A yellow icon ( ) indicates that your preference is not met. For more information about the symbols and buttons, check out the Key.

BACK

Funds Searched: 3335  
Fund Families Searched: 494

General Fund Information

1838 Investment Advisors Funds: 1838  
International Equity Fund

APPLY  
PROSPECTUS

Symbol  
Family  
Objective  
Match Score

1838 INVESTMENT ADVISORS L.P.  
International Funds

100

Features

Maximum Sales Charge  
12B1 Fee Ratio

.00%  
n/a

Performance: 1 Year

33.20%

Performance: 5 Years

n/a

Performance: 10 Years

n/a

Performance: Year to Date

21.50%

Performance: Since Inception

13.70%

102

112

FIG. 2 (0)

	0	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42	43	44	45	46	47	48	49	50	51	52	53	54	55	56	57	58	59	60	61	62	63	64	65	66	67	68	69	70	71	72	73	74	75	76	77	78	79	80	81	82	83	84	85	86	87	88	89	90	91	92	93	94	95	96	97	98	99	100	101	102	103	104	105	106	107	108	109	110	111	112	113	114	115	116	117	118	119	120	121	122	123	124	125	126	127	128	129	130	131	132	133	134	135	136	137	138	139	140	141	142	143	144	145	146	147	148	149	150	151	152	153	154	155	156	157	158	159	160	161	162	163	164	165	166	167	168	169	170	171	172	173	174	175	176	177	178	179	180	181	182	183	184	185	186	187	188	189	190	191	192	193	194	195	196	197	198	199	200	201	202	203	204	205	206	207	208	209	210	211	212	213	214	215	216	217	218	219	220	221	222	223	224	225	226	227	228	229	230	231	232	233	234	235	236	237	238	239	240	241	242	243	244	245	246	247	248	249	250	251	252	253	254	255	256	257	258	259	260	261	262	263	264	265	266	267	268	269	270	271	272	273	274	275	276	277	278	279	280	281	282	283	284	285	286	287	288	289	290	291	292	293	294	295	296	297	298	299	300	301	302	303	304	305	306	307	308	309	310	311	312	313	314	315	316	317	318	319	320	321	322	323	324	325	326	327	328	329	330	331	332	333	334	335	336	337	338	339	340	341	342	343	344	345	346	347	348	349	350	351	352	353	354	355	356	357	358	359	360	361	362	363	364	365	366	367	368	369	370	371	372	373	374	375	376	377	378	379	380	381	382	383	384	385	386	387	388	389	390	391	392	393	394	395	396	397	398	399	400	401	402	403	404	405	406	407	408	409	410	411	412	413	414	415	416	417	418	419	420	421	422	423	424	425	426	427	428	429	430	431	432	433	434	435	436	437	438	439	440	441	442	443	444	445	446	447	448	449	450	451	452	453	454	455	456	457	458	459	460	461	462	463	464	465	466	467	468	469	470	471	472	473	474	475	476	477	478	479	480	481	482	483	484	485	486	487	488	489	490	491	492	493	494	495	496	497	498	499	500	501	502	503	504	505	506	507	508	509	510	511	512	513	514	515	516	517	518	519	520	521	522	523</
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Total Expense Ratio	0	1.13%
Minimum Initial Investment	0	\$1,000
Minimum Subsequent Investment		\$0
Minimum Initial Investment for IRA		\$0
Periodic Investment		Y
Systematic Withdrawal Plan Available		Y
Annual Portfolio Turnover	0	1%
Portfolio Manager Tenure	0	4 Years
Portfolio Manager		Hans Van den Berg
Beta	0	.80
Telephone Number		800-884-1838
Ticker Symbol		INTEX
FPO Date		08/03/1995
Total Net Assets		\$84.40MM
Total Net Asset Date		08/31/1999
Fiscal Year End Date		10/31/1998
Yield		.00
Yield Date		08/31/1999
Change		.23%
Holding One		KOA Corp 2.8%
Holding Two		AiFul Corp 2.01%
Holding Three		Total SA Cl B 1.93%
Holding Four		Mannesmann AG Ord 1.86%
Holding Five		Advantest Corp 1.77%
Holding Six		Zurich Allied AG 1.77%
Holding Seven		SK Telecom Co Ltd 1.75%
Holding Eight		Takeda Chemical Indust Ltd 1.73%
Holding Nine		Societe Generale Cl A 1.72%

112

FIG. 2 (p)

Holding Ten	Adecco SA 1.67%
Cash Holdings	0.2
Equities Holdings	99.80%
Convertible Holdings	.00%
Fixed Income Holdings	.00%
Other Holdings	.00%
Holding Valuation Date	06/30/1999
1838 Investment Advisors Funds: 1838 International Equity Fund	

102

Top of page

# Key



## Match Score



## APPLY



## PROSPECTUS

These icons reflect how well a feature matches your preferences. The more blue the icon is, the better it matches your preferences.

A blue icon containing an exclamation point indicates that although this fund does not meet your preference, it may deem it more beneficial than the preference you selected (e.g. - a higher return than you specified), so please review it carefully.

The yellow icon containing a red "X" indicates that your preference was not met

The open grey circle indicates that no preference, or "Not Important" was selected

The grey hash mark or "n/a" indicates that data was not available, not applicable, or could not be verified

A measure of how closely a fund matches your selected criteria. Match scores, which range from zero to 100, do not represent an investment recommendation or ranking by investment performance. For an analysis of the score, click on the colored bars (■ ■ ■).

The blue bar indicates that a fund matches all of your preferences.

A yellow bar indicates that a fund is missing one or more of your preferences.

If you want to purchase a fund but you do not have a Wingspan Investment Services account, select the "Apply" button and complete our online application.

Before investing or sending money, read the prospectus carefully. If you want to obtain:

- A free prospectus, which contains more information including fees, sales charges, and expenses, select the "Prospectus" button.
- More than one prospectus, note the ticker symbol; you will not be able to return to these results after making your initial prospectus request.

FIG. 2 (9)

WINGSPAN FUNDPORTER

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## FundProfiler

1 Start 2 Criteria 3 Results

### Results - Display

Details for the funds you selected appear side-by-side below. The colored icons (● ●) next to each feature indicate how well each feature matches the criteria you specified. The more blue an icon is, the better it matches your preferences. A yellow icon (●) indicates that your preference is not met. For more information about the symbols and buttons, check out the [Key](#).

BACK

Funds Searched: 3355  
Fund Families Searched: 494

General Fund Information	1838 Investment Advisors Funds: 1838 International Equity Fund	AARP Growth Trust: AARP Capital Growth Fund	AARP Growth Trust: AARP International Growth & Income Fund
Symbol	INTEX	ACGFX	AAISX
Family	1838 INVESTMENT ADVISORS L.P.	AMERICAN ASSOC OF RETIRED PERSONS	AMERICAN ASSOC OF RETIRED PERSONS
Objective	International Funds	Growth Funds	International Funds
Match Score	100	100	100

### Features

Maximum Sales Charge .00%

12B1 Fee Ratio n/a

Performance: 1 Year 33.20%

Performance: 5 Years n/a

Performance: 10 Years n/a

[illegible]

## Performance: Year to

Performance: Year lo ☐ 21.50% ☐ 20.50% ☒ 13.60%

Date

Performance Since Inception **13.70%** **17.10%** **13.20%**

Total Expense Ratio	0	1.13%	0	.87%	0	1.75%
---------------------	---	-------	---	------	---	-------

Minimum Initial	\$1,000	\$2,000
Minimum Initial	\$1,000	\$2,000

	Minimum	Subsequent
	\$0	\$50
	\$0	\$50

Minimum Initial	\$0	\$250	\$250
-----------------	-----	-------	-------

Periodic Investment

Systematic Withdrawal Plan Available	Y	Y	Y	Y

Annual Portfolio Turnover

Portfolio Manager ☒ 4 Years ☐ 10 Years ☐ 0 Years

Portfolio Manager	Hans Van den Berg	Gadsden/Beaty	Cheng/Reilly/Lambert
-------------------	-------------------	---------------	----------------------

Bela	0.80	0	1.08	-	n/a
------	------	---	------	---	-----

Telephone Number 800-884-1838 800-322-2282 800-322-2282

Ticker Symbol	INTX	ACGX	AAIX
INTX	100	100	100
ACGX	100	100	100
AAIX	100	100	100

EPO Date	08/03/1995	12/04/1984	02/03/1997
08/03/1995			
12/04/1984			
02/03/1997			

Total Net Assets	\$84.40MM	\$1,739.00MM	\$34.40MM
------------------	-----------	--------------	-----------

Total Net Asset	Date
08/31/1999	08/31/1999
08/31/1999	08/31/1999

Fiscal Year	End Date
10/31/1998	09/30/1998
09/30/1998	09/30/1998

Yield	.00	.38	1.05
Yield	.00	.38	1.05

Yield Date	08/31/1999	08/31/1999	08/31/1999
------------	------------	------------	------------

1. The first step in the process of creating a new product is to identify a market need. This involves conducting market research to understand the preferences and behaviors of potential customers. Once a need is identified, the next step is to develop a concept that addresses this need. This concept should be unique and offer a clear benefit to the target market.

FIG. 2 (S)

102

112



## Key



These icons reflect how well a feature matches your preferences. The more blue the icon is, the better it matches your preferences.



A blue icon containing an exclamation point indicates that although this fund does not meet your preference, it may deem it more beneficial than the preference you selected (e.g. - a higher return than you specified), so please review it carefully.



The yellow icon containing a red "X" indicates that your preference was not met.



The open grey circle indicates that no preference, or "Not Important" was selected.

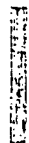


The grey hash mark or "N/A" indicates that data was not available, not applicable, or could not be verified.

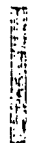
## Match Score



A measure of how closely a fund matches your selected criteria. Match scores, which range from zero to 100, do not represent an investment recommendation or ranking by investment performance. For an analysis of the score, click on the colored bars (■ [3]).



The blue bar indicates that a fund matches all of your preferences.



A yellow bar indicates that a fund is missing one or more of your preferences.



If you want to purchase a fund but you do not have a Wingspan Investment Services account, select the "Apply" button and complete our online application.



Before investing or sending money, read the prospectus carefully. If you want to obtain:

- A free prospectus, which contains more information including fees, sales charges, and expenses, select the "Prospectus" button.
- More than one prospectus, note the flicker symbol; you will not be able to return to these results after making your initial prospectus request.

FundProfiler does not make recommendations for mutual fund purchases. It does not rank funds by quality, nor rate any fund better than any other fund. It does provide you with important information on the funds within its database. Always read a prospectus carefully before investing. The prospectus contains additional information including fees, charges, and expenses. FundProfiler does not constitute an offer of sale for any of the funds displayed. Such offer can only be made by the fund's own prospectus.

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FIG. 2 (u)

00000000000000000000

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## FundProfiler

1 Start 2 Criteria 3 Results

### Step Three: View Your Results

PREVIOUS

We have compiled the list of funds below based on the criteria you selected. To view more information about the table's symbols and buttons, check out the [Key](#)

Funds Found: 5555 Funds Searched: 5555 Fund Families Searched: 494

Funds are sorted by the Match Score. To sort by another criteria click the drop-down box to the right and select that item.

Sort by: Match Score

100

To view details for up to three funds, side-by-side, check their boxes and select the "Display" button.

Symbol	Fund Name	Match Score	1 Year Return	5 Year Return	10 Year Return	Since Inception	Inception Date	
<input checked="" type="checkbox"/> <u>INTEX</u>	1838 Investment Advisors Funds: 1838 International Equity Fund	100	33.20%	n/a	n/a	13.70%	08/03/1995	<input type="checkbox"/> BUY <input type="checkbox"/> PROSPECTUS
<input checked="" type="checkbox"/> <u>ACGEX</u>	AARP Growth Trust: AARP Capital Growth Fund	100	35.00%	25.20%	15.50%	17.10%	12/04/1984	<input type="checkbox"/> BUY <input type="checkbox"/> PROSPECTUS
<input checked="" type="checkbox"/> <u>AAISX</u>	AARP Growth Trust: AARP International Growth & Income Fund	100	21.10%	n/a	n/a	13.20%	02/03/1997	<input type="checkbox"/> BUY <input type="checkbox"/> PROSPECTUS
<input type="checkbox"/> <u>AUSSX</u>	AARP Growth Trust: AARP U.S. Stock Index Fund	100	23.40%	n/a	n/a	24.10%	02/03/1997	<input type="checkbox"/> BUY <input type="checkbox"/> PROSPECTUS
<input type="checkbox"/> <u>RIEQX</u>	ABN AMRO Funds: International Equity Fund: Common Class Shares	100	31.30%	13.60%	n/a	14.50%	01/04/1993	<input type="checkbox"/> BUY <input type="checkbox"/> PROSPECTUS
<input type="checkbox"/> <u>RLAEX</u>	ABN AMRO Funds: Latin America Equity Fund: Common Class Shares	100	24.60%	n/a	n/a	4.60%	06/28/1996	<input type="checkbox"/> BUY <input type="checkbox"/> PROSPECTUS
<input type="checkbox"/> <u>AIINX</u>	Accessor Funds,		37.10%	n/a	n/a	13.40%	07/06/1998	<input type="checkbox"/> BUY

FIG. 2 (2)



100

Inc.: International Equity Portfolio; Investor Class Shares

100

Inc.: Growth Portfolio; Advisor Class Shares

100

Inc.: Growth Portfolio; Investor Class Shares

100

Inc.: International Equity Portfolio; Advisor Class Shares

AGROX

Accessor Funds, Inc.: Growth Portfolio; Advisor Class Shares

AGRIX

Accessor Funds, Inc.: Growth Portfolio; Investor Class Shares

AGIEX

Accessor Funds, Inc.: International Equity Portfolio; Advisor Class Shares

29.90%

29.10%

n/a

23.80%

08/24/1992

29.30%

n/a

n/a

22.50%

07/01/1998

37.80%

13.90%

n/a

13.40%

10/03/1994

1

Go to page:

1

of 556

Next Page >

10

GO

PROSPECTUS

DISPLAY

To view details for up to three funds, side-by-side, check their boxes and select the "Display" button.

Quick Search

Enter a fund family name to narrow your search:

GO

START OVER

Key

DISPLAY

To view details for up to three funds, side-by-side, check their boxes and select the "Display" button.

Symbol

To view fund details, click on the fund's ticker symbol.

Match Score

100

A measure of how closely a fund matches your selected criteria. Match scores, which range from zero to 100, do not represent an investment recommendation or ranking by investment performance. For an analysis of the score, click on the colored bars (■ ■ ■).

100

A blue bar indicates that a fund matches all of your preferences.

100

A yellow bar indicates that a fund is missing one or more of your preferences.

Returns

The fund's performance over the past one year, five years, ten years, or since inception. Past performance is not indicative of future returns.

Inception Date

The date the fund was opened to investors.

BUY

If you want to purchase:

FIG. 2 (w)

# Prospectus

- A fund with your Wingspan Investment Services account, select the "Buy" button next to the fund. If you're not logged in, you will need to log in and return to this screen.
- More than one fund, note the ticker symbol; you will not be able to return to these results after making your initial purchase.

**Note:** The "Buy" button takes you to a screen where you can confirm your purchase. Not all funds displayed in the FundProfiler are available for purchase.

## PROSPECTUS

Before investing or sending money, read the prospectus carefully. If you want to obtain:

- A free prospectus, which contains more information including fees, sales charges, and expenses, select the "Prospectus" button.
- More than one prospectus, note the ticker symbol; you will not be able to return to these results after making your initial prospectus request.

Quick Search

To view funds from just one family, use Quick Search.

START OVER

To choose a new profile, select the "Start Over" button.

FundProfiler does not make recommendations for mutual fund purchases. It does not rank funds by quality, nor rate any fund better than any other fund. It does provide you with important information on the funds within its database. Always read a prospectus carefully before investing. The prospectus contains additional information including fees, charges, and expenses. FundProfiler does not constitute an offer of sale for any of the funds displayed. Such offer can only be made by the fund's own prospectus.

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FIG. 2 (x)

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Buy/Sell  
Extended-Hours Trading  
Options  
Buy Calls/Puts  
Close Calls/Puts  
Covered Calls  
Mutual Funds  
Buy  
Redeem  
Exchange  
Orders  
Order Status  
Cancel Order  
Change Order  
Fees  
Schedule

Buy Mutual Funds

65M034321

Fund name: AARP CAPITAL GROWTH FUND  
Amount: The minimum investment amount is \$1,000  
Enter amount of purchase:  
 dollars  
-OR-  
 shares

Purchase amount is for principal only and does not include any transaction fees.

Reinvestment: Would you like to reinvest the dividends, income and capital gains of this fund?  
☒ Yes ☐ No

Prospectus: I have read, understand and accept the terms of the prospectus.  
☒ Yes ☐ No

Review Before Sending

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102

FIG. 2 (4)

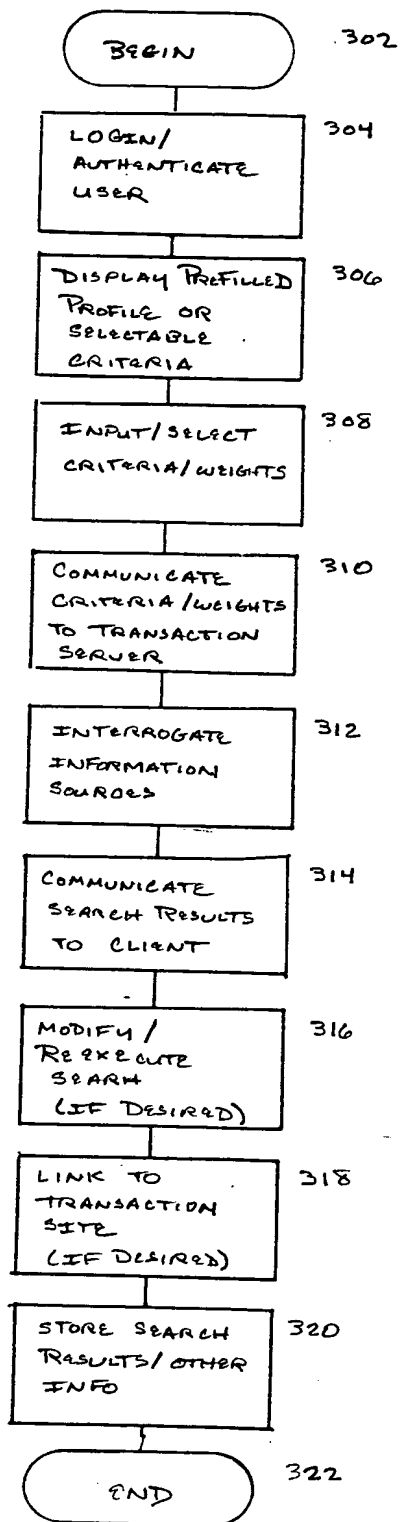


FIG. 3